

Annual Requirements Checklist for USDA Child Nutrition Programs

Use this form to track the completion of the following requirements related to the NSLP/SBP operation. All required program-related materials must be retained by the School Food Authority (SFA) for 3 years plus the current year.

Requirement	Due Date	Initials	Date Completed
File the Annual Participation and Policy Packet online at https://neo.maine.gov/DOE/neo/core/	By August 15		
Free and Reduced Price Meal Application Distribute the Free and Reduced Price Meal Application after July 1 to all households (except those certified through Direct Certification). The Free and Reduced Price Meal application link includes an updated prototype application, parent notification letter, notice of direct certification letter and other related forms. Process completed applications within 10 operating days after the date of receipt. Send notification to households with students who are eligible for free or reduced price meals and to households that are denied benefits. File all approved and denied applications at the SFA, along with any other documentation supporting eligibility of benefits. Do not discard any applications including duplicates. http://www.maine.gov/doe/nutrition/forms/index.html	After July 1		
Direct Certification Run direct certification and maintain the original list(s). Send notification to households of students that are eligible for free meal benefits. Prototype Direct Certification eligibility notification letters are available on our website: http://www.maine.gov/doe/nutrition/forms/index.html . SFAs are required to run Direct Certification a minimum of three times per school year, once at the beginning of the school year, three months after first run, and six months after first run, per USDA SP 31-2011. <i>It is highly recommended to run Direct Certification more frequently.</i> <u>Maintain (print or save electronically) all original Direct Certification match lists at the SFA.</u>	First Run: at or near beginning of school year (July - August) Second Run: Three months after initial effort (October – December) Third Run: Six months after initial effort (January – March) Record Additional Runs: _____		
Benefit Issuance (Master) List Create/maintain a benefit issuance list noting the student's name, benefit status, date of qualification and benefit type/source (i.e. DC, application). Use the following documentation to create the list: <ul style="list-style-type: none"> • free and reduced price meal applications • Direct Certification lists • documentation designating students as homeless by the homeless liaison • documentation designating students as migrant by migrant coordinator • any additional documentation for foster or runaway students. As a reminder, carryover benefits from the prior school year are in effect for the first 30 <u>operating</u> days of school, or until new benefit documentation is received.	Before the beginning of the school year Updates should be made throughout the year as new benefit documentation is received or as new students arrive		
Civil Rights Complete the annual Civil Rights Training for all staff involved with USDA Child Nutrition Programs. Maintain a copy of the training and attendance log at the SFA. Resources including a training video can be accessed at https://www.youtube.com/user/MaineChildNutrition	Before beginning of school year and as needed throughout the year		

Check to make sure the “And Justice for All” poster is on display for public view at each site.			
Food Safety Plan/Standard Operating Procedures Review the food safety plan at each site and make any necessary updates. A sample plan is available from NFSMI at http://sop.nfsmi.org/ and should be customized to reflect the plan at each site. Conduct staff food safety training, making sure to include substitutes and volunteers.	Before beginning of school year and as needed throughout the year		
Afterschool Snack Program () N/A Complete first required Afterschool Snack Program On-site Monitoring form and keep on file at the SFA (if applicable). A sample form is available under “On-site Monitoring Forms” at: http://www.maine.gov/doe/nutrition/forms/index.html	1st review within first 4 weeks of snack service		
Verification - start verification process <ul style="list-style-type: none"> Verifying Official determines how many free and reduced price meal applications were APPROVED on or before October 1(carryover applications should not be included), calculates how many free and reduced price meal applications need to be verified and selects verification sample from the pool of applications that were APPROVED on or before October 1. Directly certified students are not subject to the verification process. Confirming Official conducts confirmation review of the free and reduced price meal applications that were selected for verification – signs and dates the bottom of the application. This does not apply to districts that use an electronic approval system. Determining Official sends letters to households selected for verification	On or after October 1		
Verification – review verification materials <ul style="list-style-type: none"> Review documents submitted by households selected for verification and follow-up with households that did not respond to verification request Send letter to households selected for verification to let them know the results Submission of Verification Collection Report (VCR) must be completed and submitted by November 20 Additional resources can be accessed at http://www.maine.gov/doe/nutrition/forms/index.html 	By November 15 Report due by November 20		
Verification – update student meal benefits Make any necessary benefit changes as a result of verification	Upon completion of verification		
On-site Monitoring Form () N/A For schools with more than one location where meals are served, complete monitoring visits & document results, including any follow up, for all sites by February 1 annually. A sample form is available under “On-site Monitoring Forms” at: http://www.maine.gov/doe/nutrition/forms/index.html	No later than February 1		
FFVP On-site Monitoring Form () N/A Complete the FFVO Site Monitoring Review Form and keep on file.	No later than February 1		
Afterschool Snack Program () N/A Complete second required Afterschool Snack Program On-site Monitoring form and keep on file. A sample form is available under “On-site Monitoring Forms” at:	2nd review should be done in the second half of the school year		

http://www.maine.gov/doe/nutrition/forms/index.html			
Professional Standards Training Tracking Track completed school nutrition related training for staff to ensure the require Professional Standards training hours are met. A tracking tool is available for downloaded here: http://www.maine.gov/doe/nutrition/laws/prof-standards.html	Complete throughout the school year		
Paid Lunch Equity Tool () N/A for RCCI's, P2, CEP, and non-pricing schools Complete the Paid Lunch Equity (PLE) tool for the upcoming school year. The Paid Lunch Equity (PLE) tool must be completed prior to setting lunch prices for the upcoming school year. Maintain an electronic and printed copy of the completed PLE tool at the SFA. The previous year's tool will be used to complete the current PLE tool.	In the spring and/or near the end of the school year, when lunch prices are being determined for the upcoming school year		
USDA Foods Annual Order Complete the USDA Foods Annual Order in NEO for the upcoming school year.	March -April		
Summer Food Service Program Application ()N/A Complete the Sponsor Application and Site Information Sheet(s) for participation in the Summer Food Service Program.	By April 30 – for USDA foods availability or By June 10		

Daily and Monthly Requirements for USDA Child Nutrition Programs

Requirement	Due Date
Complete daily menu production records . Production records are required by USDA but not in any required format. Production records should document all items prepared and served, including quantities, for SBP, NSLP and ASP. Maintain production records for 3 years plus the current school year. Production record templates can be found at http://www.maine.gov/doe/nutrition/forms/index.html	Complete daily
Obtain daily meal counts for each site. Complete and review Daily Participation Edit Check prior to submission of claim for reimbursement. Maintain the monthly edit checks from each school at the SFA.	Completed daily, review monthly
Submit monthly claim for reimbursement in NEO. https://neo.maine.gov/DOE/neo/core	Monthly, no later than the 8 th of each month

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To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

(1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov. USDA is an equal opportunity provider, employer, and lender.